

PERSONAL EXPENDITURE PLAN

Name: _____

Date: _____

I. Annual Assets Projection

Free balance in personal account _____

Cash in the house _____

Person-owned account in community _____

Subtotal current available personal allowance balance _____

Annual "unearned" personal allowance

Monthly _____ X 12 = _____

Annual "earned" income

Monthly _____ X 12 = _____

Subtotal annual "unearned" and "earned" personal allowance _____

II. Total Annual Assets:

Other Assets _____

Burial Accounts _____

III. Money Management Assessment Date Completed: _____

Amount/Frequency _____ / _____

IV. Personal Spending Projections

Personal shopping/luxury items _____

Entertainment/diversion _____

Associational life _____

Vacation, home and family visits _____

Gifts (must benefit the individual) _____

Other spending considerations _____

Total Personal Spending Projections: _____

V. Upper Limit Cash Cap in the Residence _____

Comments:

Signatures:

Individual _____ Date _____

Advocate _____ Date _____

Residential Designee _____ Date _____

Residential Supervisor _____ Date _____